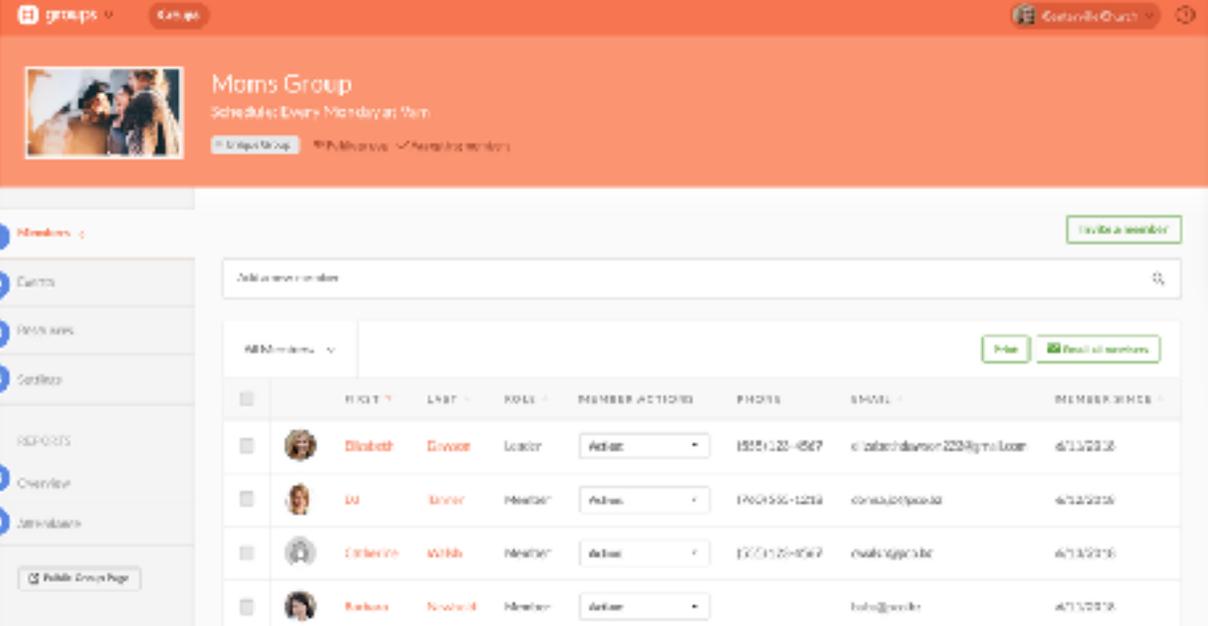


Introduction to PCO Groups (for Leaders)

Planning Center Groups is an online application that will help you manage your members, plan events, take attendance, and share resources. This document will help you, the leader of a group, understand the main functions of PCO Groups and help you get started.

The picture below is of the the administration page that each group has.



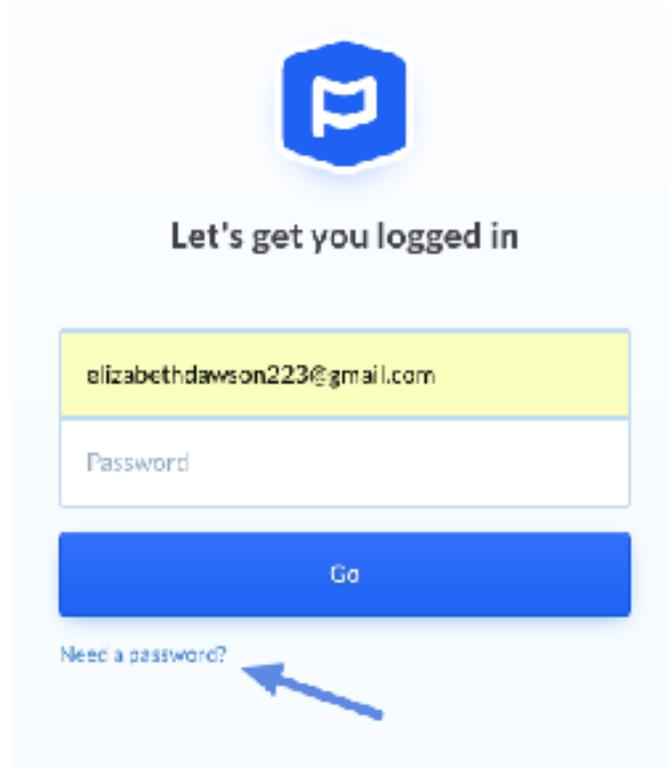
The screenshot shows the administration interface for a 'Moms Group'. The header includes the 'groups' logo, a 'Groups' button, and a user profile for 'Cynthia Quast'. The main content area features a group profile card with a photo, the name 'Moms Group', and the schedule 'Every Monday at 7am'. Below this is a navigation menu with options like 'Members', 'Events', 'Resources', and 'Settings'. The 'Members' section is active, displaying a table of group members with columns for 'EMAIL', 'LAST', 'ROLE', 'MEMBER ACTIONS', 'PHONE', 'EMAIL', and 'MEMBER SINCE'. The table lists four members: Elizabeth Crook (Leader), WJ (Member), Catherine White (Member), and Barbara Newell (Member). Each member row includes an 'Action' dropdown menu. A sidebar on the left contains a 'Public Group Page' button.

Once logged into Groups, as a Group Leader you can do the following for your group from this page:

- Add and remove members and communicate with group members.
- Manage the group's calendar by adding and removing events.
- Add and remove group resources.
- Modify the group information, such as name, description, contact information, location, and group image.
- View various group reports.
- View attendance reports.
- Manage their personal contact information.

Logging in to Groups

The first time you go to log in to Groups, you might need to create a password. On the [login page](https://accounts.planningcenteronline.com/login/new) (accounts.planningcenteronline.com/login/new), select the *Need a password?* link below the email and password fields.

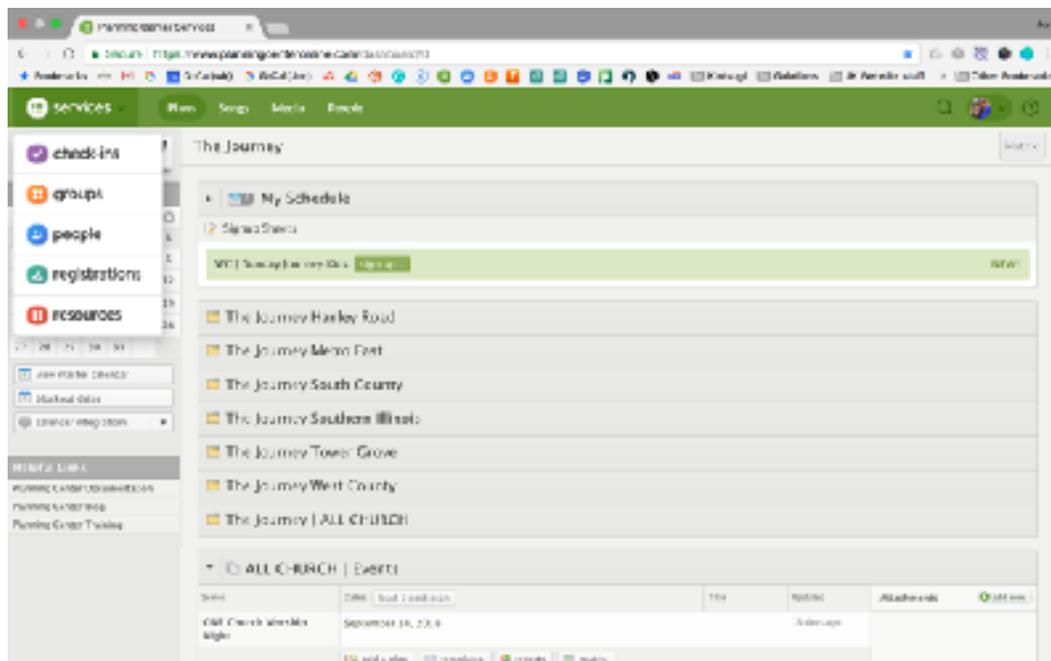
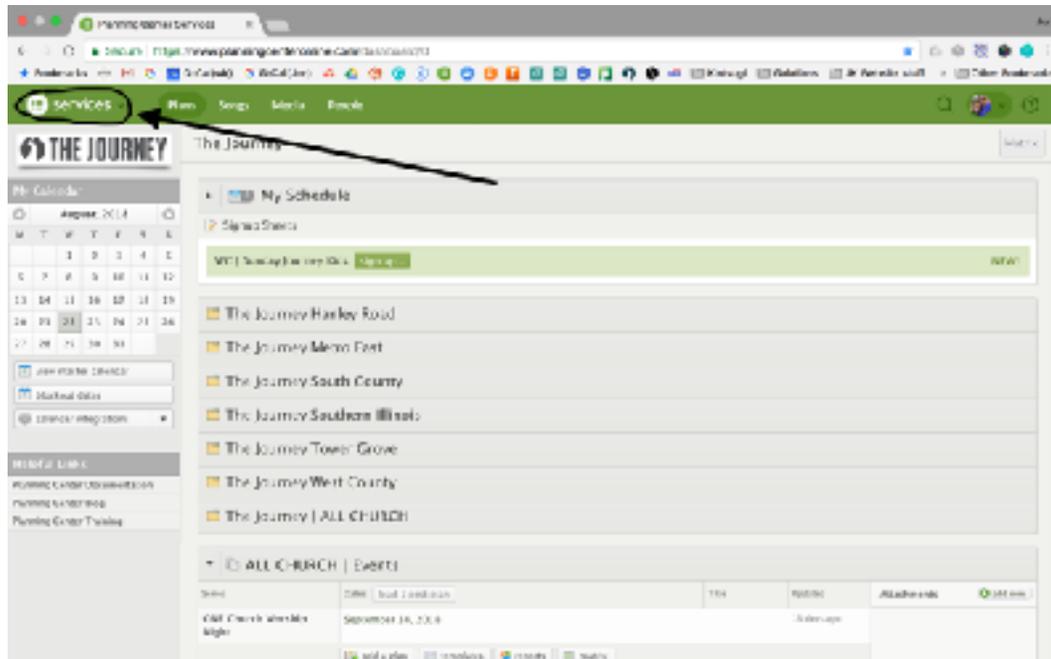


Enter the email address used to set up your profile, then a verification code will be sent to that email address. After entering the code, you will be able to create a password and then log in.

Once you are logged in, you will stay logged in until you log out or after 2 weeks of inactivity.

If you already have an account in PCO Services, which would be the case if you have been on any serving team(s), you may be taken to the Services page when you log in.

To switch from PCO Services to PCO Groups, click on *Services* on the top left corner of the screen. When the drop down appears, select *Groups* and you will be taken to the PCO Groups page.



Manage Members

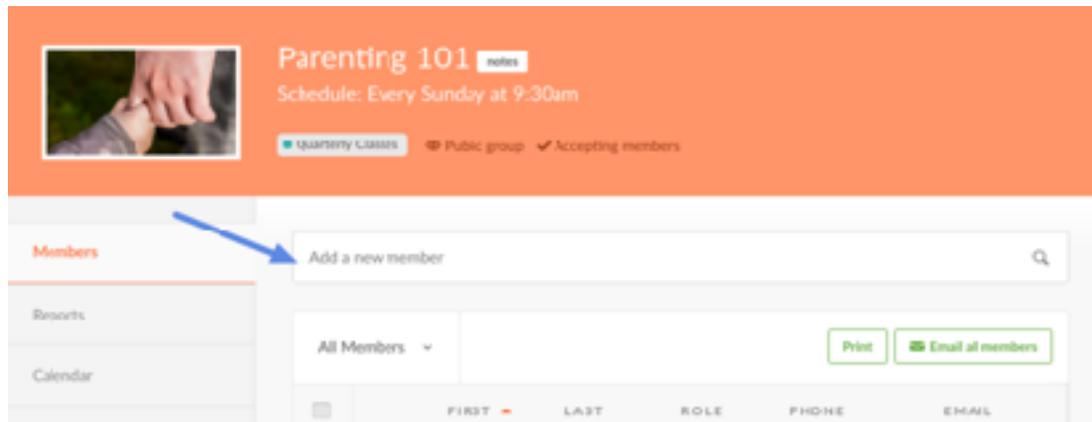
The first page you see when you select your group is list of all your members. There are some quick actions you can take on this page, such as emailing members or removing them from your group. You will also have the option to add new members from this page.

The screenshot shows the 'Manage Members' interface for a 'Moms Group'. The page has an orange header with the group name and a description: 'Moms Group Schedule: Every Monday at 5am'. Below the header, there is a sidebar on the left with navigation options: 'Members 4', 'Events', 'Resources', 'Settings', 'REPORTS', 'Overview', and 'Attendance'. The main content area is titled 'Group Membership Requests' and features a search bar for adding new members. Below the search bar, there is a table of current members with columns for 'FIRST', 'LAST', 'ROLE', 'MEMBER ACTIONS', 'PHONE', 'EMAIL', and 'MEMBER SINCE'. The table lists six members: Katie (Member), Elizabeth (Leader), CJ (Member), Barbara (Leader), Johnny (Member), and Nolan (Member). Each member row includes an 'Action' dropdown menu. At the top right of the member list, there are buttons for 'Print' and 'Email all members'.

	FIRST	LAST	ROLE	MEMBER ACTIONS	PHONE	EMAIL	MEMBER SINCE
<input type="checkbox"/>	Katie	Cher	Member	Action	(760)555-1232	katie@psdsd.com	4/15/2018
<input type="checkbox"/>	Elizabeth	Devore	Leader	Action	(801)123-4567	elizabethdevore222@gmail.com	4/21/2018
<input type="checkbox"/>	CJ	Taneyr	Member	Action	(760)555-1232	dennisj@psdsd.com	4/12/2018
<input type="checkbox"/>	Barbara	Hembold	Leader	Action		barb@psdsd.com	4/11/2018
<input type="checkbox"/>	Johnny	Wertz	Member	Action	(361)000-0000	johnny@psdsd.com	4/10/2018
<input type="checkbox"/>	Nolan	Jakobs	Member	Action	(260)555-8765	nolan@psdsd.com	4/11/2018

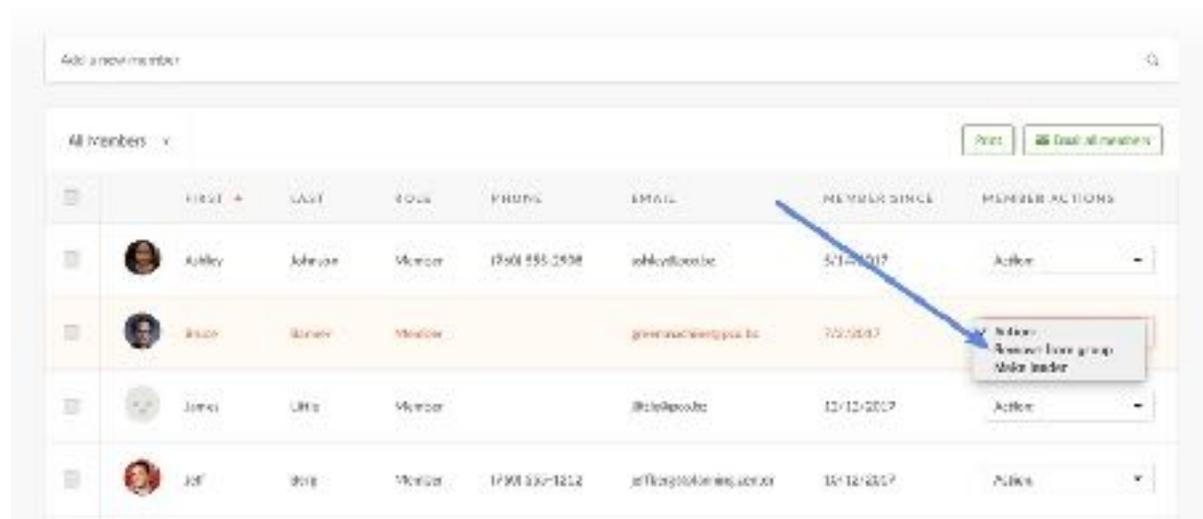
Adding & Removing Group Members

As a leader in your group, you will be able to add a person from the *Members* tab. Type the name of the person you'd like to add, and if they don't yet exist in the database, select *Create a new member* to add them to your database.



Remove a Group Member

As a leader, you can remove a member from your group on the *Members* tab.

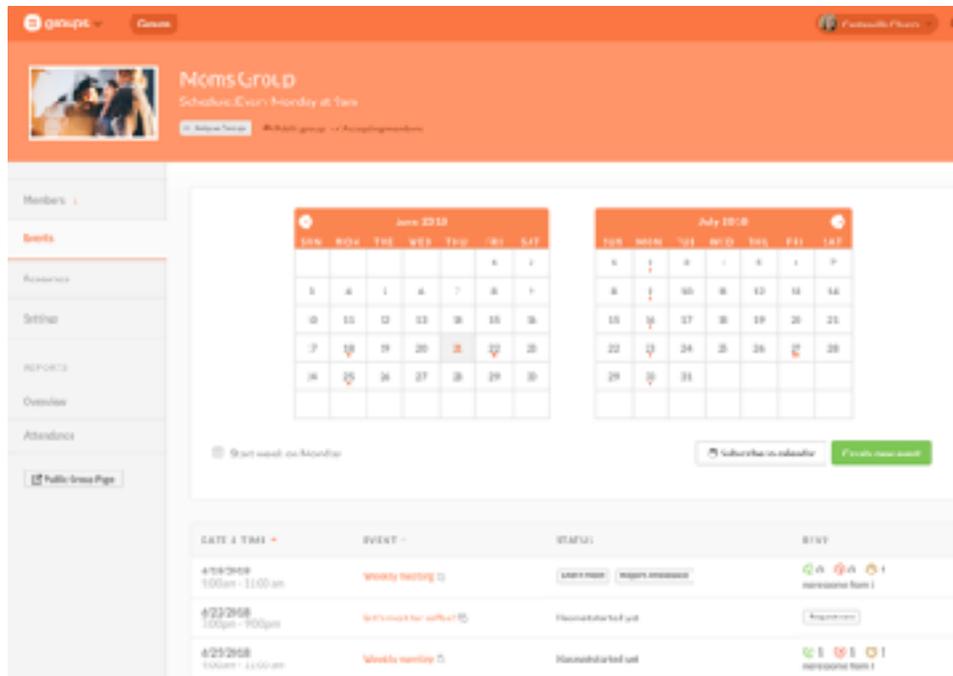


Choose the dropdown under *Member Actions* on the same line as the person then select *Remove from group*.

Events

The Events tab shows you a calendar of upcoming events for your group, along with some quick actions you can take on each event.

From the event list, you can quickly report attendance or cancel past events. You can request RSVPs from your members for upcoming events and quickly view the responses.



Once you select an event, you will see more details about that event, along with the option to edit the event.

Creating, Editing, or Deleting an Event

Create an Event

From the Calendar tab on the main page or the Events tab on a group, select *Create a new event*.

We're viewing the combined calendar for all 14 groups.

Filter

February 2018

SUN	MON	TUE	WED	THUR	FRI	SAT
			1	2	3	
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28			

Start week on Monday

March 2018

SUN	MON	TUE	WED	THUR	FRI	SAT
			1	2	3	
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Create new event

DATE & TIME	EVENT	GROUP	GROUP TYPE	STATUS
5/14/2018 1:00pm - 4:00pm	Catherine Dinner	Droit Small Group	Small Group	Dish's Home Report attendance

Add the name, date, and time of the event. If it is a repeating event you will be able to choose how often the event will repeat, as well as when it will end. For weekly meetings, you should set it up as a recurring event.

New Event

Group
Droit Small Group

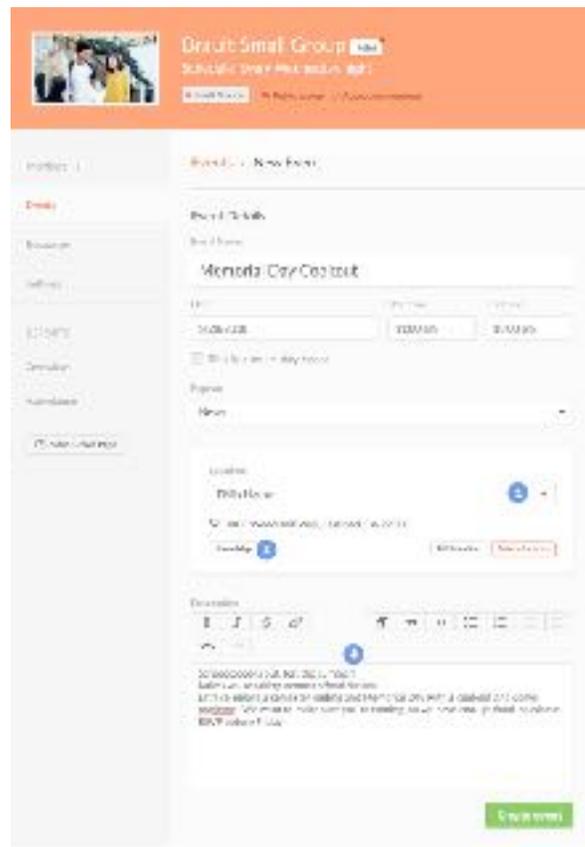
Event Name
Memorial Day Cookout

Date: 5/28/2018 Start time: 11:00 am End time: 10:00 pm

This is a multi-day event

cancel more options Create

Select *more options* to be taken to the event page and update the description and location or select *Create* to update that information later.

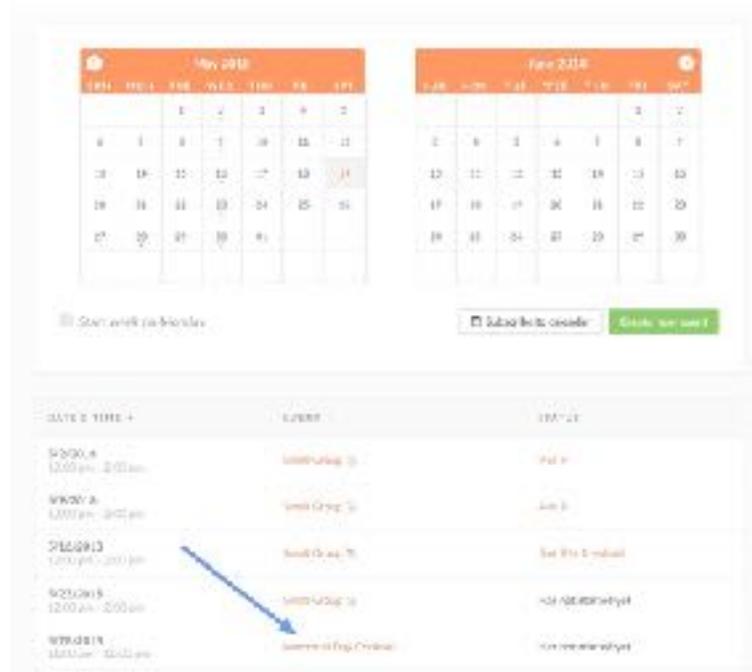


- Choose a location from the dropdown and use *Edit location* to add a specific address, or, if you don't know the address, drop a pin at your location.
- View the preview members or non-members will see on the groups page.
- Enter the description for the event shown on the groups page.

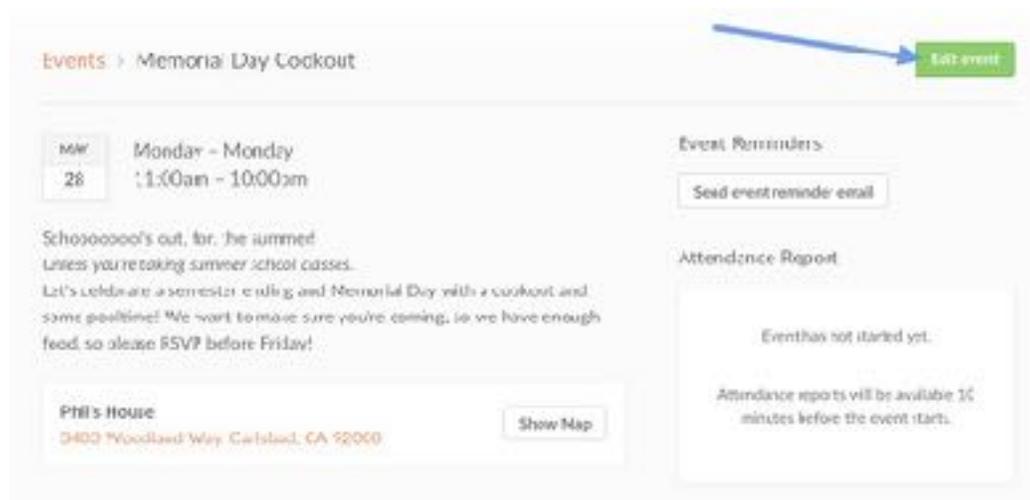
Select *Create event* when you're finished, and your event will be added to the calendar!

Edit the Event

Select the event you would like to edit from the calendar list within your group.



View more details like a map of the location or select *Edit event* to make changes. From this event page, you can send a reminder email to all your group members!



Edit any information then scroll to the bottom and Save. If your event repeats, choose to save only this event or all future events as well.

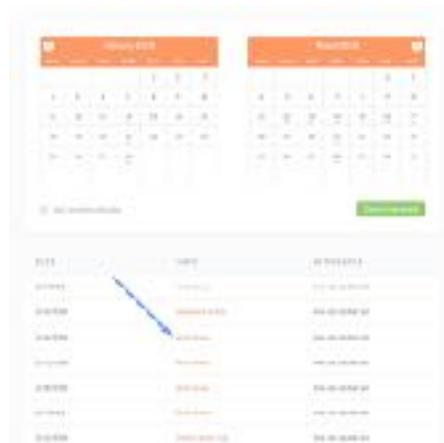
Cancel or Delete the Event

If you have an event that is no longer taking place, there are two ways to update your calendar:

1) **Delete an Event:** This is permanent and removes all traces of the event from the calendar. If attendance was taken and Visitors were listed, that information disappears as well.

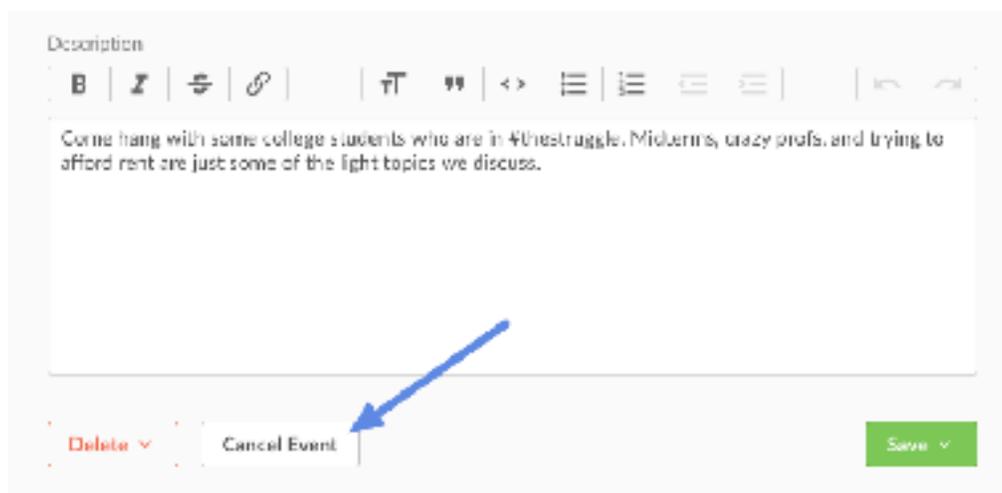
2) **Cancel an Event:** Unless your event was created by mistake, this is usually the best option for events that aren't taking place. When you use this option, the event remains on the calendar but is labeled as "Canceled" so that members are aware.

On the group calendar, select the event.

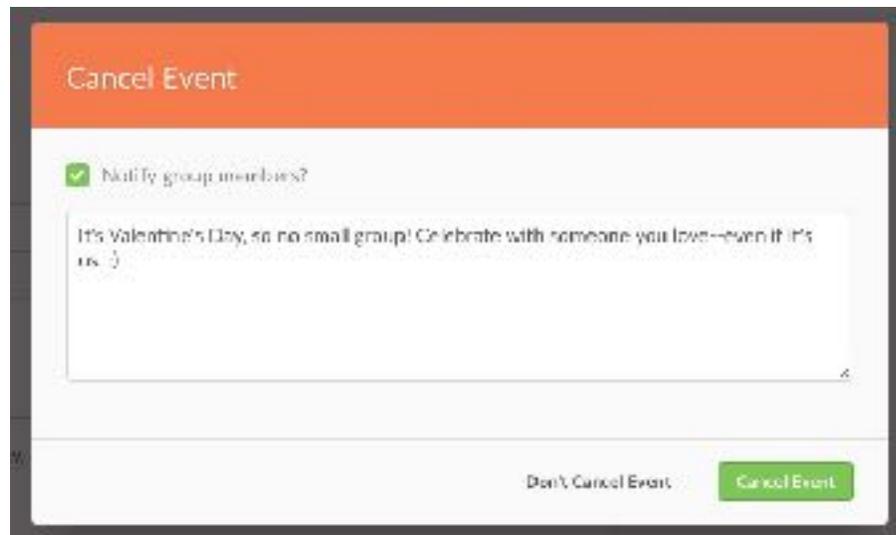


Cancel Event

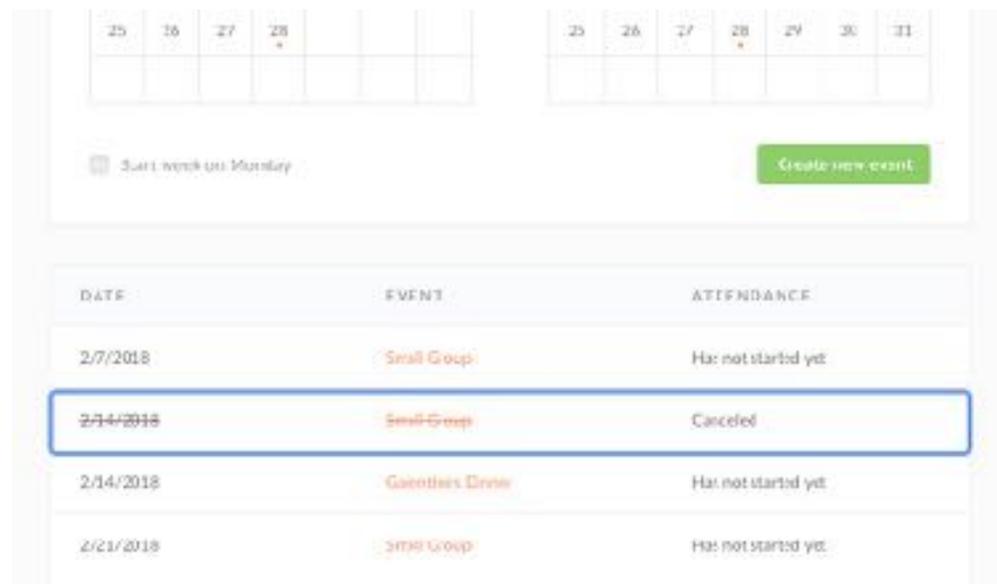
Scroll to the bottom of the event and choose *Cancel Event*.



Once you have hit “cancel event” you'll be given the option to notify group members the event has been canceled. Check the box and type in the reason to send to group members.

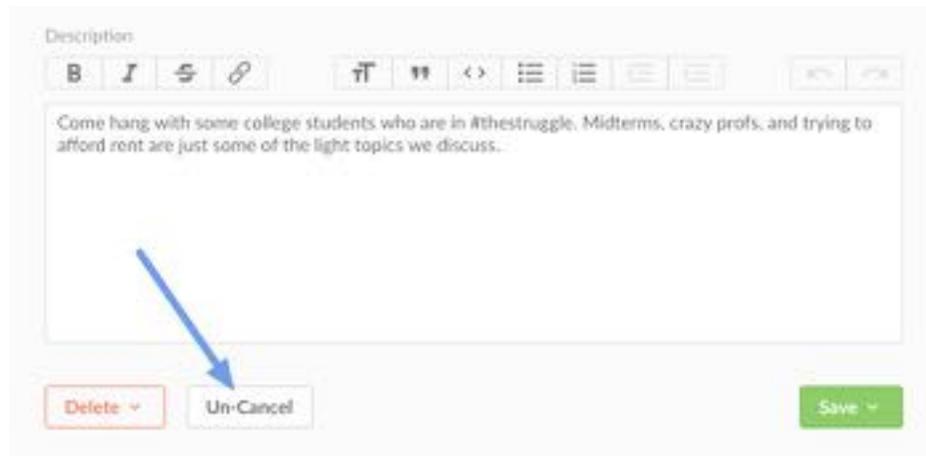


Choose *Cancel Event* to finalize the change. The event will remain on the group calendar; however, it will now have a line through it, and the attendance column shows *Canceled*.



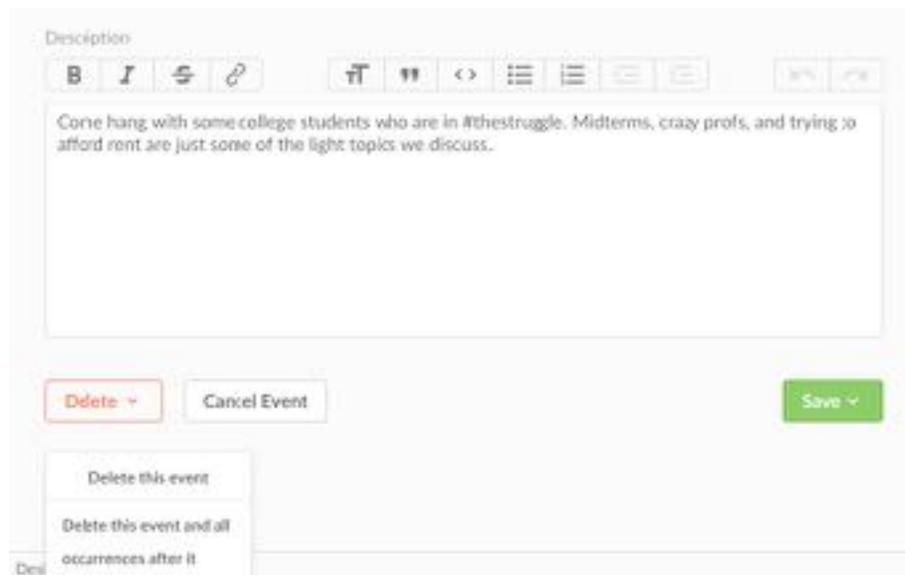
DATE	EVENT	ATTENDANCE
2/7/2018	Small Group	Has not started yet
2/14/2018	Small Group	Canceled
2/14/2018	Valentines Dinner	Has not started yet
2/21/2018	Small Group	Has not started yet

Everyone is clear the event was scheduled but is no longer taking place. If you change your mind, you can go back to the event and un-cancel!



Delete Event

Scroll to the bottom of the event and select Delete.



If your event repeats, choose to delete only this event or all future events as well.

Taking Attendance

With weekly meetings set up as events, you will now be able to take attendance. Events are listed in chronological order and show the date, name, and attendance, if it's already been taken. Select *Report Attendance* to be taken directly to the attendance roster.

Parenting 101 new
 Schedule Every 14th & 21st of Month

Members

Members

APRIL 2018

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Exclude as Member

Add as Member [Click here to add](#)

MAY 2018

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

MEMBERS

MEMBER	STATUS	STATUS
JULIA B...	Member	Not at a meeting
JANIS B...	Member	Not at
JANIS B...	Member	Consent
WENDY B...	Member	Not at Open Invitations
EMILY B...	Member	Not at

Put a check next to members who were present and search for others who attended and want to be added as a member.

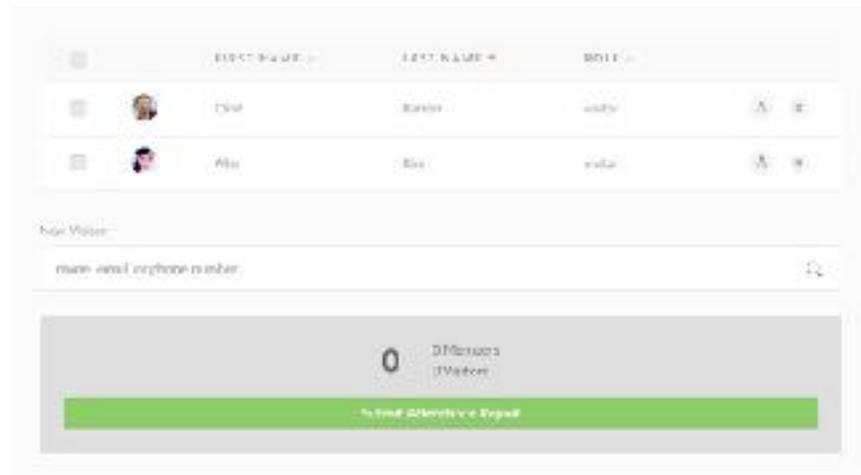
Events > Meetup > Attendance Report

Meetup
 Location: Garbino House
 Address

	FIRST NAME	LAST NAME	ROLE	
<input type="checkbox"/>	ROSA	AVILA	member	<input type="checkbox"/>
<input type="checkbox"/>	DAVE	AVILA	member	<input type="checkbox"/>
<input type="checkbox"/>	TRACY	BARR	member	<input type="checkbox"/>
<input type="checkbox"/>	JOE	BOG	member	<input type="checkbox"/>
<input type="checkbox"/>	WILLIAM	GARCIA	leader	<input type="checkbox"/>
<input type="checkbox"/>	LOU	HEATH	member	<input type="checkbox"/>
<input type="checkbox"/>	KIMMY	JOHNSON	member	<input type="checkbox"/>
<input type="checkbox"/>	TERESA	JOHNSON	member	<input type="checkbox"/>
<input type="checkbox"/>	EMILY	KYLE	member	<input type="checkbox"/>
<input type="checkbox"/>	NOELAN	WILSON	member	<input type="checkbox"/>

New Member

Previous visitors show at the bottom of the roster. Add a new visitor from the search bar.



Select *Submit Attendance Report* to record the attendance to the event.